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Marketing Practice Group

The Marketing Practice Group's mission is to serve as a valuable resource for member firms in order to help them evaluate and improve their marketing efforts. The group discusses marketing topics during quarterly telemeetings and one face-to-face annual meeting, sharing experiences, successful strategies, and innovative marketing initiatives, and communicates relevant information to all member firms, either directly or via the BKR website, and through the meeting summaries.

The group is comprised of marketing professionals from firms throughout the BKR association. New members are always welcome to join the meetings.

Contact BKR's Executive Office or the chair for more information.

Marketing Tidbits is produced as an information service with the understanding that it does not render accounting, legal or other professional advice.

The commentary contained herein is not intended, nor should it be relied upon, to replace specific professional advice.

The Power of a Global Association...
With a Personal Touch

E-Newsletters with Biz Actions

By Marsha Oliver, VP of Marketing
Mize, Houser & Company, P.A.

For the first 25 years of my marketing career at Mize Houser, I was responsible for our newsletter. Originally it was monthly, but it evolved to a quarterly, four-page printed product. While we knew we needed to stay in front of our clients, prospects and referral sources, this format was not achieving our goals of frequency, relevancy, variety and style.

I had chatted with BizActions over the years at AAM conferences and, in early 2008, we engaged them to provide our first e-newsletter, targeted to our McDonald's owner/operator niche. Within six months, we had launched an additional set of newsletters to the rest of our audience and now have versions targeted to the following industries – construction, manufacturing/distribution, auto dealerships, non-profits and residential real estate/development.

We have opted for bi-weekly e-newsletters, which certainly achieves our goal of frequency. BizActions provides a new article every week under the caption "Timely Opportunities," and these are current, timely articles, which achieve our goal of relevancy. In addition, each issue includes 2-3 articles from a revolving group of categories. These include human resources, operations, management, sales and marketing, plus some "accounting-related" articles. We can even write our own articles or "personalize" an article with one of our associate's picture and byline. All these article content options achieve our goal of variety. And the colorful, clean look of the newsletters accomplishes our need for "style."

Customer support from BizActions has been excellent. Even when there have been technology bumps in the road, our customer support rep is quick to get us back on track with patience and tact!

Did You Know:

Ingenuity Marketing Group, LLC, BKR's Strategic Alliance Partner, can support your firm with:

- Strategic Marketing
- Growth Consulting
- Branding
- Public Relations
- Strategic Coaching
- Customized Training
- And much more...

Visit <http://ingenuitymarketing.com/meetus-partnerships-bkr.html>. Contact Kristy Gusick at (651) 690-3358, and tell them that you are a member of BKR.



The best news, however, is the reaction we get from our readers. We can tell who is opening the newsletters and which articles they're reading. The comments from clients, prospects and referral sources indicate they appreciate receiving a variety of concise, interesting articles.

In 2009 we used our BizActions web-based technology in new ways - to accomplish an e-mail marketing campaign and to invite attendees to our Employer Compliance Workshop.

We're delighted with the way e-newsletters from BizActions accomplish our goals of frequent "touches," relevant information, content variety, and a great-looking product. Plus, the convenience of having it all accomplished with relatively little effort on our part is priceless!

Inside this Issue

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- ✓ Nisivoccia welcomes a new marketing coordinator
- ✓ Scarpello Consulting — a new strategic alliance partner
- ✓ Bolster your marketing program with lunch and learns

Nisivoccia Welcomes New Marketing Coordinator to Firm

Laura Lampron joined Nisivoccia this January and assumed the day-to-day operations for all marketing activities.

Please take a moment to tell us about your marketing background/related experience.

I joined the firm in January 2010 and assumed responsibility for all marketing activities including communications, special events, interactive communications and outreach initiatives to support business growth and development.

I have more than 20 years' experience in marketing communications and program management with service provider and enterprise communication solution companies. Prior to joining Nisivoccia & Company LLP, I was a Director, Client Relations for a full service public relations, marketing and communications consulting firm where I provided marketing consulting services for Fortune 500 clients in various industries.

I'm accomplished at creating and implementing fully-integrated customer and sales focused marketing and communications programs. Other areas of expertise include marketing communications, international business & marketing management, employee & partner programs, program management and customer & employee satisfaction programs.

What are the firm's goals?

Nisivoccia & Company LLP is focused on building awareness and expanding their client base beyond its current market, which is northern New Jersey. Focus segments for growth are public entity, not-for-profit and private enterprise. In addition to growing the traditional accounting and advisory services client base, the firm also plans to expand its medical and dental practice management services.



Could you please provide some background information on the firm?

Established in 1970, Nisivoccia & Company LLP is celebrating forty years as one of the largest and well respected full-service, accounting and consulting firms based in New Jersey. In addition to traditional tax, accounting, auditing and advisory services, they have maintained specialties in municipal and county governments, school boards and higher education, not-for-profit organizations, manufacturing, financial services, practice management, technology and real estate investment, development and related contractor services.

Our partners and professional staff of accountants and advisors are committed to a personal, hands-on approach as they strive to ensure clients attain their business goals. They are licensed CPAs, many with multiple certifications, who have a broad range of professional experience in their areas of expertise and the industries we serve.

What are you hoping to get out of your relationship with BKR?

I'm hoping to leverage the resources of BKR to support both our marketing efforts as well as business objectives.

What are some ideas that you have/hope to implement for the firm?

To start, we are going to refresh our brand and strengthen our image and presence in the marketplace. We also plan to do targeted awareness building in our specialty areas – practice management, public entity and not-for-

profit. For example, one of our practice management consultants is a regular contributor to a New Jersey physician's magazine. Most of our partners are already considered thought leaders in their specialties and contribute through articles or speaking engagements on a regular basis. We hope to streamline these efforts and offer more through our web site by way of webinars, podcasts, blogs and general informational articles.

There is another effort to enhance our website. We want to better organize our content based on our clients and the markets we serve. We also want to make it a "go to" resource for our clients regarding the latest industry news and insights.

Lastly, we hope to strengthen our direct client communications efforts this year through emails, newsletters and events.

Is there anything else you would like to add?

At Nisivoccia & Company LLP, we pride ourselves in giving back to our communities and actively encourage participation in philanthropic activities with community-based not-for-profit and charitable organizations. Well over 1500 hours a year are donated by our partners and staff members working on local boards and with various organizations and charities. As a firm, we participate in Habitat for Humanity, the Community Soup Kitchen of Morristown, New Jersey and the Holiday Help for the Needy programs. And, we are always willing to pull a team together for a volleyball or softball game to support a cause.

BKR Announces New Strategic Alliance Partner

Cost segregation services firm available to all BKR members



Scarpello Consulting will provide discounted cost segregation services to all BKR member firms working with corporate property owners, investors and their tax advisors to provide the strategies needed to accelerate depreciation deductions, defer tax and improve cash flow.

Scarpello Consulting will bill each participating member firm 75% of their standard fees for completing a cost segregation study. The firm will be given an opportunity to decide whether and what percentage of the remaining fees (up to 100%) they would like to pass on to their client.

For more information, contact Michael Pruss at (402) 214-7030 or mpruss@scarpelloconsulting.com.

Lunch & Learns: A Great Way to Bolster Your Marketing Program

By Irene Valverde

Marketing Director at Gumbiner Savett Inc.

Lunch & learns can be very effective tools in training all levels of staff in soft skills, such as marketing, without making them feel pressured. Because lunch & learns tend to provide a more casual setting than most training environments, they are perfect for concepts that are not the “norm” for most accounting staff. With a tailored marketing lunch & learn program, you can help your firm’s employees grow personally and professionally. Here are a few tips on how to achieve this.

Creating the program – This is typically the most challenging part of starting a marketing lunch & learn program. First, you need to define your audience and what you are trying to achieve. This will help you in coming up with a list of potential topics. You can also find a variety of ideas on the web and AAM’s website, if you are a member. Give them what they want or need! The programs I offer are tailored for senior associates and junior staff, including all administrative staff. However, everyone at the firm is invited and encouraged to attend. Surveying staff on what they would like to get out of training is an easy way to deliver what they want. Staff also feels like they are being heard when you take the time to solicit their opinion. You don’t need a formal survey, just a simple e-mail asking for requests and then some in-person follow-up. You can also keep a running tally of ideas from conversations you have around the office. We came up with a very successful lunch & learn on speed networking from a conversation I had one day with a senior associate.

I normally run our lunch & learn programs. However, if you are not comfortable doing so, then getting someone at your firm to conduct the training works well. Turn to up-and-coming managers and senior managers because it gives them a great opportunity to shine as well as helps them with their business development skills. If you don’t have existing content for your lunch & learn, a quick 15-minute Google search is helpful in pulling together ideas about your chosen topic. You can then create training materials from your notes and research (I usually create a PowerPoint presentation).



Achieving good attendance – Offer free food. Who doesn’t enjoy a free lunch? (Or at least a free dessert or drink if budget doesn’t allow for lunch.) Providing lunch is a great way to get people to at least “test it out.” Once they attend, they figure out that the information is valuable and they end up staying for the duration of the training. You can also offer CPE if that is something your firm allows (CPAs can never have too much CPE).

Get management support for your lunch & learns – Solicit partner and senior staff attendance and participation. If junior staff sees a partner attending a marketing lunch & learn, the message it conveys is that the firm sees the program as important training and also that the partners are not above learning new techniques for marketing. Regardless of who the training is geared towards, it always sends a good message to have management buy-in and support.

Keep it interesting – Mix up the format of your lunch & learns so that they appeal to people who may be on the fence. Surveys/quizzes, guest speakers, video, role playing and other ideas help in keeping the training fresh for attendees. It also limits the time you or your speaker has to be in the hot seat.

Talk their language – Focus on not using too

much “marketing speak.” I admit that I use marketing “lingo” quite a bit, but I make an effort to keep the presentation as simple as possible. Also, using examples that pertain to client experiences or client outreach usually helps staff better connect with the concepts. Use real world examples from conversations and experiences you have had with partners and staff.

Be consistent – A lunch & learn program with one lunch a year will not be very effective. Even if you start with little attendance, the small group that is interested will continue to come. Don’t take on more than you are prepared to handle unless you know you have the time and content — try quarterly training or every other month. Having the regularity in the program will let management and staff know that you are serious about the program and the skills being taught.

We have made great progress with our lunch & learns. People now ask me when the next one is. Staff now let me know what topics they are interested in. Bottom line, a lunch & learn marketing program will give your employees (regardless of level) a better understanding of the importance of marketing. The programs will also prepare and motivate them to more successfully promote their firm.

Have a special event coming up? Roundtable discussion? Charity event? Special firm celebration? Send us your pictures! No lengthy write-up required. Just give us a scope of the event and we will feature it in Tidbits.

Send your stories to Helen at bkr@bkr.com.